

# Fort Worden State Park Long Range Plan

## Project Status Report – January 2008

### Report Organization

PROS Consulting LLC, has prepared this progress report for the Fort Worden State Park Long Range Plan providing useful information as to the status of the numerous processes and deliverables associated with each part of this project. This report includes information provided by various sub-contractors including BCRA Architecture, Outworks, Berger Group, Transpo Group, and Bill Acker Consulting Services as the components involving them become active.

This report contains the following information:

- Summary of Part 1 and deliverable status per the Scope of Work (11.16.2007)
- Summary of Part 2 and deliverable status per the Scope of Work
- Summary of Part 3 and deliverable status per the Scope of Work
- **Attachment:** Stakeholder Interview Summary
- **Attachment:** Priority of Government Analysis

### Part I: Kick-Off Meeting/Communications

The PROS Team has worked closely with Washington State Parks and Recreation Commission (Agency) staff to complete the following elements of Part 1 of this project:

1. **Kick-off Meeting:** This kick-off meeting conducted on August 14, 2007, was attended by the key task force members and PROS Team members to confirm project goals, objectives, and expectations that will help guide actions and decisions of the PROS team. Detailed steps of this task included:
  - Confirmation – The project goals, objectives, scope, and schedule were confirmed. Key deliverable dates were established and confirmed for each phase of the project.
  - Communications – Confirmation on lines of communication, points of contact, level of involvement by the Task Force and State leaders and staff, and other related project management details. Protocols and procedures for scheduling meetings were agreed to.
  - Scope Revision – A scope amendment was updated November 16, 2007, to reflect identified changes in project scope as a result of the initial meetings.
2. **Stakeholder Workshop:** PROS conducted an upfront workshop with existing partners over a three-day period (November 27-29, 2007) to review the scope, timelines, and processes to be achieved and the role the partners will play in formulating the Business Plan and feasibility components. This process is on-going and will involve multiple sessions with existing partners over the course of the project.

## Part I – Status

**Scheduled Start:** August 14, 2007

**Scheduled Completion:** On-going

### Deliverable Status:

- |                              |          |                                 |
|------------------------------|----------|---------------------------------|
| • Kick-off Meeting Notes     | Complete | August 14, 2007 Meeting Minutes |
| • Stakeholder Workshop Notes | Complete | November 27-29, 2007 Workshops  |
| • Progress Status Reports    | Complete | November 2007 Report            |

## Part II: Compile Existing Information and Data

1. **Data Collection:** The Project Team will collect, log, and review any remaining data and information that we do not currently maintain to facilitate a thorough understanding of the project background. Data and information to be collected include but not limited to:

### Programs and Services

- I. Current contracts with on site providers including expiration dates and annual reports
- II. Existing programming occurring on site throughout the year
- III. Participant data including number of persons, demographics and other available information, organized by program

### b. Operations and Finances

- I. Financial information (budgets and related reports) on existing operations at Fort Worden. Five years of data preferred.
- II. Staffing levels including organization charts
- III. Marketing plans

### c. Facility and Site

- I. Collect all existing Fort Worden Site planning documents and previous reports related to the Long Range Master Plan from State Parks that are pertinent to this process.
- II. City of Port Townsend Transportation and Utility Plans
- III. Review capacity levels of existing buildings throughout the year. Information provided by Washington State Parks.
- IV. Get a list of Planned Capital Improvements scheduled for the site from State Parks.

### d. Governance

- I. Hold initial meeting with key agency staff and Task Force to present introduction of project and discuss coordination points related to organizational development and governance models. In addition, PROS will attend an initial coordination meeting with the Attorney assigned from the Attorney General's office.

## Part II – Status:

**Scheduled Start:** November 12, 2007

**Scheduled Completion:** December 31, 2007

### **Deliverable Status:**

• Data Collection Log	Complete	August – December 2007
• Electronic Copies of Key Information	On-going	Electronic deliverables provided
• Governance Models Presentation	Complete	Suggested Task Force process

## Part III: Assess Existing Conditions and Identify Issues, Opportunities, and Constraints

### 1. Programs and Services

- (a) **Program Inventory:** The PROS Team will develop an inventory of existing programs and services provided at Fort Worden. We will assess current offerings and the capabilities and capacity for comparison against proposed programs and services during a gap analysis performed in a later task.
- (b) **Stakeholder Interviews:** PROS will be conducted with individuals and stakeholders as identified by the State to evaluate existing life-long learning ideas and concepts and test preliminary findings from the market analysis performed by PROS. Stakeholders will include existing and potential partners, task force members, and immediate stakeholders. PROS Team recommends that community and stakeholder input form a major element of the Long Range Plan, and will utilize appropriate state contacts and relationships to identify stakeholders, gather input, and disseminate information to help gain consensus on the key program initiatives and marketing strategies. This process has to be broad, gathering qualitative information from which strategies will be developed and formulated into the Business Plan for the site.
- (c) **Life-Long Learning Benchmark Assessment:** A preliminary market analysis will be performed by PROS to document the programming needs and identify the target market as it applies to life-long learning. Perform analysis of existing Life-Long Learning Centers that exist in the United States and Canada through an iterative process. This will include qualitative and quantitative reviews to identify existing providers program scope and needs of users, program parameters and standards in place used by other suppliers, scope of programs provided to include length of programs, program content, instructor qualifications, price, user accommodations requirements, class size, and the size of the market that will describe the parameters and requirements of a Life-Long Learning Center.

PROS will document their program approach, target audiences, age segments represented, program content, needs of users, user capability of paying for services, pricing strategies used, program design and standards, life cycle of programs, facility needs and spaces to accommodate users, and drawing power as it applies to distance that the market will drive or fly to have access to the services. This information will be compared to the existing resources of Fort Worden, and will help to frame the vision for the project to introduce to involved stakeholders. This analysis will be performed to derive the program and development potential of the Fort Worden site.

- (d) **Target Market Analysis:** Based on insight from the benchmark assessment, the PROS Team will document the demographic characteristics of the target market associated with various needs including the estimated size of the market served. Trends will be documented based on growth, stability, or decline status and estimated frequency of participation by each demographic characteristic. This will help to determine the size of the activity market by age segment and frequency rates that can be applied to Fort Worden State Park. These figures will drive the revenue projections and costs and will assist in developing the conceptual program plan for the site.

## 2. Operations and Finance Assessment

- (a) **Organizational Assessment:** The PROS Team will review the analysis report completed of the current management practices and limitations of Fort Worden State Park to understand its operational situation. This analysis will provide support for a future organizational structure and staffing requirements, and ways to improve operational efficiencies, policy development, process improvements, system and technology improvements, and marketing/communication capabilities.
- (b) **Financial Review** – The Project Team will perform analysis to document the financial situation of Fort Worden. The financial analysis will look at the budget, pricing policy, user fees, current and other revenue generating opportunities, grant opportunities, and the revenue forecast. This analysis will identify the financial situation of the Fort Worden's operations with three primary goals:
- Understand the financial dynamics to further advance the understanding of operations gained through the work described above
  - Review funding and accounting practices with an objective of accurate financial fund tracking and the ability to have more useful financial information for strategic decision-making
  - Seek opportunities to improve the financial sustainability including evaluating expenditures and increasing current and new sources of revenue

The PROS team will review current financial policies. This review will include comparison of current policies with national standards of best practice agencies. PROS will recommend policies and adjustments to current policies where enhancements may be needed or gaps are identified.

- (c) **Partnership and Management** – PROS will evaluate existing partnerships and potential new contributing partnerships for the site and how to integrate them into the selected management model. New partnership management policies and alternatives for existing partners will be recommended. Partners will need to be encouraged to invest capital in the site to support the Life Long Learning Center program and become part of the program operations on site. PROS will develop a strategy and policy report to support formal partnership agreements that are fair and equitable for the State. This will include identification of potential partners by specific activity, funding parameters and capabilities, and agreement guidelines to support implementing these partnership agreements as part of the management plan for the site.

- (d) **Operational and Financial Assessment Report** - Prepare and deliver current *Operation and Management Assessment Report*. Develop recommendations to improve processes, achieve operational efficiencies, improve policy development, optimize systems and use of technology, and enhance marketing and communications capabilities.

### 3. Facility and Site

- (a) **Site Research and Analysis:** The following steps will be performed:

Research and review information provided by Washington State Parks including previous phases of the Long Range Plan and other related project materials; review existing plans and drawings.

Zoning Code Research & Analysis: Review and analyze relevant municipal planning controls and documentation (Zoning Code and Comprehensive Plan Analysis). Includes one site visit and a meeting with the City of Port Townsend staff to validate findings. Prepare a three page summary memo of the findings.

- (b) **Landscape Architecture:** The Berger Partnership will visit the park to assess the overall character of the existing landscaping that may need to be addressed. Berger will provide a two to three page summary presenting their findings on landscape conditions and resource management that need to be addressed to accommodate the life long learning program. This work will be reviewed by Barbara Swift who was involved with Phase 1 through 3 of this project to provide clarity and unity from previous work completed.

- (c) **Historical Architecture Research and Analysis**

Outworks to research and review the Long Range Plan and other related project materials, download plans and drawings and attend one meeting with team to discuss approach.

Use Types of Existing Buildings: Outworks, with assistance from Washington State Parks, to inventory five representative existing buildings and determine the use and building classifications. This task does not include the preparation of as-built documents for any undocumented buildings if it is determined that this is necessary.

BCRA Architecture to coordinate historical building assessment and cost estimating efforts. This assessment and will present the baseline information for the design guidelines to be performed by Outworks in a later task.

- (d) **Civil and Transportation Engineering:** Review existing infrastructure (*Park-wide Systems Plan*): BCRA Civil to review maps and documents (provided by Washington State Parks) of the existing infrastructure (water, sewer, storm, roadway, sidewalks, public transportation, parking and access.) Identify any needed readily apparent infrastructure improvements and any needed additional information. Natural gas is not included in this scope of work, since there does not appear to be gas on the site. Review the general condition of the existing network of roadways and walkways and identify existing and potential accessible (ADA) routes of travel. Compile existing maps and documents in preparation for the final part of this phase. One site visit is anticipated for this task.

The Transpo Group will review existing traffic conditions in the vicinity of the park and identify obvious “fatal flaws” that may need to be addressed further in future work. They will roughly estimate trips generated by the proposed build-out of Fort Worden, based on

information provided by Pros Consulting. Transpo will provide a two to three page summary presenting their findings on traffic conditions.

- (e) **Utilities:** Hultz BHU Cross Engineers will visit the site and review maps of existing power and communications facilities on the park grounds. They will identify readily apparent infrastructure deficiencies that may need to be addressed further in future work. Hultz BHU Cross will provide a two to three page summary presenting their findings on power and communications infrastructure conditions.
- (f) **Cost Estimates:** Bill Acker Consulting Services (BACS) will provide rough estimates on readily apparent infrastructure upgrades that are identified by other members of the consultant team. BACS will also provide square foot costs to upgrade five representative buildings to future uses. Cost estimate will be provided in a Microsoft Excel format with an itemized breakdown of anticipated costs.

#### 4. Governance (Completed by Task Force with assistance from Agency Staff and PROS)

- (a) To be determined by Agency Staff and Task Force. PROS will coordinate informational support.

#### Part III – Status:

**Scheduled Start:** November 12, 2007

**Scheduled Completion:** March 31, 2008

#### Deliverable Status:

• Program Inventory	Complete
• Stakeholder Interview Summaries	Complete
• Benchmark Analysis	Developing
• Finance and Operations Review	Developing
• Zoning and Land Use Assessment	Developing
• Landscape Architectural Assessment	Developing
• Architectural Inventory of Historic Buildings	Developing
• Civil Engineering Infrastructure Review and Recommendations	Developing
• Existing Traffic Conditions Assessment	Developing
• Utility Assessment	Developing
• Preliminary Cost Estimates for Building Upgrades	Holding